



**My
Executor
Box®**

SUCCESSION PLANNING MADE SIMPLE



A secure online platform to store all your financial information



I HAVE A WILL, SO WHAT'S THE PROBLEM?

When you arrange a will your will writer records your wishes, ie .who you wish to pass your assets on to.

However, the will writer does not record where your assets are located. On death your legal representatives, executors and family have to try and find where your money is located .

What bank ? What fund management company? What insurance company?

IT'S NOT EFFICIENT AND MONEY IS LOST

The Dormant Bank and Building Societies Act of 2008 has enabled the UK government to seize **£1.6 BILLION** of people's money from lost and forgotten bank accounts. In 2022, the range of assets which could be seized was increased to include pensions, investments, shares and property.

GET PEACE OF MIND

Added to the trauma of a family members death , do you really want people turning your home upside down to try and find bank accounts and life insurance policies?



THE SOLUTION IS MY EXECUTOR BOX?

Our paperless society and growing digital footprints are having a profound impact on estate planning and administration. It is now harder than ever for executors and legal representatives to access all the information they need to fulfil their role.

That is where My Executor Box comes in. It's an online data vault for clients to record their assets and share with the right people at the right time.





Uses ▾ How it Works Pricing FAQs Contact

Free Trial

TECHNICAL SUPPORT

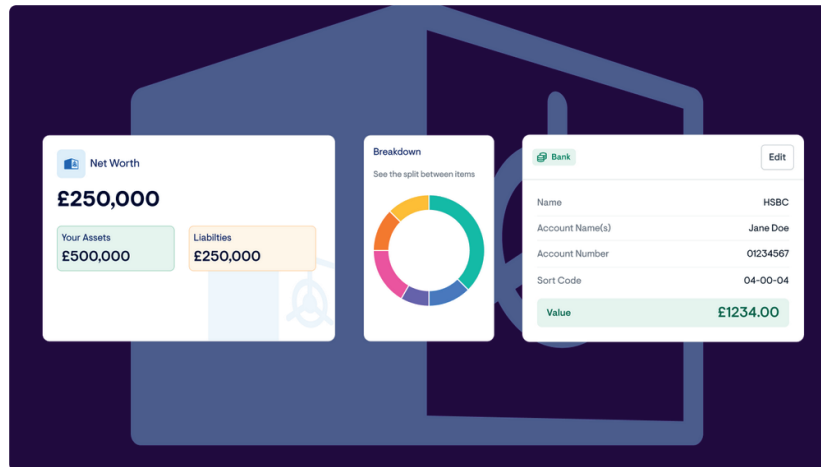
We have a support team available via calls or emails to help you and we can arrange home visits if required.

SUCCESSION PLANNING MADE SIMPLE

A secure online platform to store all your financial information.

Assisting both you and your executor with your estate when the time comes.

How it Works



HOW DOES IT WORK? – Visit www.myexecutorbox.co.uk

Step 1 – Open your Executor Box

Create your account and start your free trial. No card details are required!

Step 2 – Invite your Executors

Invite your executors to have immediate access or access only after your death. Your choice and under your control.

Step 3 – Get Peace of Mind

It's your hard-earned money so protect it for your beneficiaries.



Record your Assets

Add all your assets in an easy to use format by asset type, including bank accounts, investments and property



Upload your Documents

Upload your important documents for easy access such as your will or power of attorney



Manage your Executors

You control who can view and assist you by inviting your executors to access your Executor Box as and when you wish. It's your box so you can give access to anyone you choose.



Calculate your Net Worth

Your liabilities are automatically deducted from your assets to give a true picture of your net worth and estate value



Record your Liabilities

Record mortgages and loans to give a true picture of your net worth



A Life Remembered

Tell future generations who you were and what you did with your life. Leave messages for family members for future events such as weddings etc



PEACE OF MIND

Wouldn't it be good to tell your family members and executors "If anything happens to me, just visit My Executor Box."

My Executor Box is a simple and secure platform, which ensures that your family, friends or charities benefit from the funds which you wish them to receive

WHAT ARE THE COSTS?

Annual

£59.99 (discounted)

Monthly

£5.99 per month

Lifetime

£499 one off payment

10% DISCOUNT APPLIES AS AN ESTATE PLANNING SERVICES (SCOTLAND) CLIENT

As an early adopter of this new technology your will writer has negotiated a 10% discount on the subscription fees listed above. Use your online discount code EPSS to receive your 10% subscription discount when you create an executor box.

Alternatively you can take a free 30 day trial without having to provide card details, if you want to try before you buy.

Your 10% will writers
discount code is

EPSS

TESTIMONIALS

"As I have got older my thoughts have turned to the question, would my family really know where all my money is if anything happened to me? It's been a real concern. As a former banker I can see the need for a solution and I believe My Executor Box could be the answer."

Ian Reid OBE & Mrs C. Reid, Glasgow

My husband has recently suffered serious ill health and at one point we thought we were going to lose him. Thankfully, he is now on the road to recovery. Kenny has always been the financial person in our relationship and I wouldn't know where to begin if things had gone wrong. At the very least My Executor Box gives me the assurance I would know where our money is.

Kenneth and Isobel Grummitt, Rutherglen

"As a further addition to our comprehensive Estate Planning services, we are pleased to partner with My Executor Box, who provide an excellent innovative service which is overdue in our modern online world. This will really help clients, executors and legal firms deliver a quicker, more efficient executry service when required."

Alasdair MacLeod
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